



Euromonitor
International

Carbonates in Germany

January 2024

Table of Contents

Carbonates in Germany - Category analysis

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sugar reduction remains key to success
On-trade recovers slowly, but consumers face financial challenges
Mixers benefits from the aperitif trend

PROSPECTS AND OPPORTUNITIES

Competition will come from other soft drinks categories
Consumers seek brands that correspond with their values
Health awareness will determine the future

CATEGORY DATA

Table 1 - Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023
Table 2 - Off-trade vs On-trade Sales of Carbonates: Value 2018-2023
Table 3 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023
Table 4 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023
Table 5 - Off-trade Sales of Carbonates by Category: Volume 2018-2023
Table 6 - Off-trade Sales of Carbonates by Category: Value 2018-2023
Table 7 - Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023
Table 8 - Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023
Table 9 - Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023
Table 10 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023
Table 11 - NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023
Table 12 - LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023
Table 13 - NBO Company Shares of Off-trade Carbonates: % Value 2019-2023
Table 14 - LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023
Table 15 - Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028
Table 16 - Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028
Table 17 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028
Table 18 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028
Table 19 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028
Table 20 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

Soft Drinks in Germany - Industry Overview

EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture
2023 key trends
Competitive landscape
Retailing developments
Foodservice vs retail split
What next for soft drinks?

MARKET DATA

Table 21 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023
Table 22 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023
Table 23 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023
Table 24 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023
Table 25 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2023
Table 26 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2023
Table 27 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2023

Table 28 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2023
Table 29 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023
Table 30 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023
Table 31 - Off-trade Sales of Soft Drinks by Category: Value 2018-2023
Table 32 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023
Table 33 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023
Table 34 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023
Table 35 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023
Table 36 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023
Table 37 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023
Table 38 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023
Table 39 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023
Table 40 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023
Table 41 - NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023
Table 42 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023
Table 43 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023
Table 44 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023
Table 45 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023
Table 46 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023
Table 47 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028
Table 48 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028
Table 49 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028
Table 50 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028
Table 51 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028
Table 52 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028
Table 53 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028
Table 54 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028
Table 55 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028
Table 56 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

APPENDIX

Fountain sales in Germany

Trends

DISCLAIMER

SOURCES

Summary 1 - Research Sources

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with

country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/carbonates-in-germany/report.